**Functional Specification**

**Bank of Ireland for Intermediaries Website Build**

**Restricted**

**Version 0.4**

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Authorised for:

Enjoy Digital and Bank of Ireland for Intermediaries

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Change History

|  |  |  |  |
| --- | --- | --- | --- |
| Date | Version | Updated by | Sections Updated |
| 09.09.20 | 0.1 | Hannah Mead | Doc draft |
| 14.09.20 | 0.2 | Hannah Mead | Revision post client review.Changes:5.5 section on accessibility6.4 – Usync diagram6.7 – clarification on BTL calculator7.2.2 copyright in footer8.4 – CTA pod – clarity on links from titles10.4 – videos from media library not vimeo11.10 – added contact template11.11 – added criteria look up template |
| 18.09.20 – 29.09.20 | 0.3 | Hannah Mead | Revisions post wireframesRevisions post client feedback:5.3 elastic search section5.4 analytics added requested requirements6.7 calculators – update to BTL6.8 u marketing suite updates6.9 – pdf updated scope6.10 – email 6.11 – added live chat6.12 – search auto suggest7.1.1 header, logo style on scroll7.1.2 register/log in link picker7.1.3 – capital F For intermediary, content editable text7.1.6 - navigation7.2.1 - footer intermediary banner required7.3.1 notification – no images as per wireframe7.3.2 – added warning bar scrolling7.4.1 – unsupported browser bar8.1 – awards pod8.3 – 3 across pod10.1 – standard content10.5 podcast embed10.6 – gallery common element10.1 withdrawn prods clarification11.2.2branded pdf10.3 -pdf section11.3 withdrawn products11.4.1 -bdm finder postcode format11.5.1 – solicitor look up postcode format11.7 criteria look up13 – search results- pagination11.8 – service update template11.9 – listing pages deleted |
| 21.10.20 | 0.4 | Hannah Mead | Addition of pending change requests. Feedback from BOIUpdates following design rollout |

# Purpose of this document

The purpose of this document is to define the structure, components and functional elements that are to be developed by Enjoy Digital Communications Ltd. This document does not address any creative aspects of the project.

This document is to be used as the reference point for the project for both client and agency. Enjoy Digital communications Ltd will develop the elements stated within this functional specification for the agreed budget. If additional requirements are raised that have not been included in this specification, they will be quoted for separately and added to the specification when the client signs off the additional budget.

This document will also be used as the primary reference point during agency and client UAT.

# Project Overview

Enjoy Digital is to undertake the scoping, design and development of BOI4I’s new website. The key objectives for the project are:

* **To apply the new BOI branding -** Enjoy Digital will design and build a website that is in line with the new BOI rebrand.
* **Scope refinement –** starting from scratch provides the opportunity to re-define the website functionality and ensure there aren’t legacy features that are no longer needed, providing a platform for future growth
* **Technical advancement** – the website will be fully rebuilt in Umbraco 8, providing a more stable, up to date CMS and the opportunity to ensure the CMS is streamlined for users
* **Marketing capability advancement –** Umarketing suite will be built into to new site to enable the use of additional capabilities

# Related Documents

|  |  |
| --- | --- |
| Document | Link |
| Designs | https://projects.invisionapp.com/share/JBYJXAETWN7#/screens/429727351 |
| Sitemap | BOI4I\_WebBuild\_8006\_sitemap |
| Usync diagram | Provided via email: BOI4IUsyncProcess |

# Deployment Process

The deployment process will be covered in the technical features in the Usync section. This will dictate the different environments the website will have for code and content updates.

# Base Requirements

|  |  |
| --- | --- |
| Title | Requirement |
| 5.1 Browser support | The following desktop browsers will be supported across desktop, mobile and tablet viewports:* Microsoft Edge – latest version (Windows 10 only)
* Chrome – Latest version
* Firefox – Latest version
* Safari – OS 10.15 (Catalina) and mac OS 10.14 (Mojave)

The following mobile browsers and operating systems are included:* Android 8+ (Chrome only)
* iOS 12 and 13 (Safari only)

The website will be visible in older versions of these browsers but will not specifically be optimised for them. The latest versions of browsers supported are those that are stable and live at the time production commences. Please note that we only support browsers at 100% zoom level. |
| 5.2 Umbraco CMS | The website will be built utilising the latest stable version of the Umbraco CMS |
| 5.3 Elastic search | The website will be built utilising the latest stable version of Elastic search for the search functionality.The search functionality will include auto-suggest on the search terms as per the current site functionality.The suggestions will show in a dropdown from the main search bar |
| 5.4 Mobile compatibility | The website will be fully responsive.Responsive web design is a technique which allows websites to respond to their environment, in particular the available screen size, whether the device is a desktop, mobile or tablet. It is based on a series of fluid grid layouts, negating the need for a separate mobile skin. The website will be responsive as appropriate to the design |
| 5.5 Analytics and tracking | Google Tag Manager code will be added to all pages in order to deploy Google Analytics. All event tracking will then be managed through Google Tag Manager <http://www.google.co.uk/tagmanager/>.The exact requirements for tracking will be defined following completion of the design phase. As a minimum this will cover:* Conversion points (e.g. login/register links)
* Interactions with key functionality (e.g. calculators, search, look ups)
* Form engagement (drop off and completion)
* Downloads of PDFs
* Carousel interaction
* Pod interaction - clicks
* Scroll depth information
* Video views, also tracking drop off points – views are within scope, for drop off points this is unknown until Enjoy start the build as may not be possible
* Podcast listens, also tracking drop off points - listens is within scope, for drop off points this is unknown until Enjoy start the build as may not be possible

For podcast and video tracking this only covers those videos and podcasts hosted within the umbraco media libraryIncluded within the project, tracking will be implemented through Google Tag Manager and tested post-go live to ensure all is working as expected.  |
| 5.5 Accessibility | Where possible our designers and developers will design and build the site to WGAC-AA standards. |

# Technical Requirements

|  |  |
| --- | --- |
| System | Integration |
| 6.1 Redirects | Enjoy Digital will install an Umbraco redirect module to allow the CMS user to bulk upload URL redirects. They will then have the ability to add, edit and remove redirects from a csv file and re-upload into the CMS – these can be set as either Permanent Redirects (301) or a Temporary Redirect (302).  |
| 6.2 Metadata | Enjoy Digital will install an Umbraco meta data uploader to allow the CMS user to bulk upload meta titles and descriptions.The CMS user will have the ability to download this information in csv file format. They will then have the ability to add or edit meta data and re-upload into the CMS. |
| 6.3 Umbraco forms | Ability to create and manage forms within the CMS. Ensure the licence is bought before we begin work on the project and check all form submissions get captured within the CMS.Umbraco Forms also allows customisable workflows to be added to a form, which dictates what happens once a form has been completed. You could send an email off to a set user or redirect the user to a thank you page. |
| 6.4 Jumoo – Usync content transfer | BOI4I require a content transfer system to safely manage content updates from staging to live. The system Enjoy will implement to handle this is: <https://jumoo.co.uk/usync/complete/>The requirements for the different staging, test and live environments are depicted in the below diagram |
|  |
| 6.5 Hosting | BOI4I will host the new website on their existing Tibus servers. All server set up will be the responsibility of BOI4I.Enjoy will require a server specification document in regards to Tibus.Enjoy to add in the process of how we would transfer the site to BOI servers |
| 6.6 Qualtrics survey javascript integration | In order to add surveys to the new website BOI4I will be using a third-party tool called Qualtrics. BOI4I will be responsible for setting up a Qualtrics account and providing Enjoy with the necessary log in details.Enjoy will build the CMS pages to allow the Qualtrics embed code to be added to any page on the website. This will allow BOI4I to add the embed code of the desired survey, created in the Qualtrics platform, into the CMS page.No front-end development will be done on the Qualtrics code to enhance how this appears on the new BOI4I website. |
| 6.7 Centralised calculators embed code | The new website will allow for BOI4I to input an embed code for the following calculators:* + First start calculator
	+ Affordability calculator
	+ BTL ICR calculator (now unpublished on the Post Office site)

The embed code will be generated on a separate Platform – centralisation CMS and will allow users to copy and paste the embed code onto a specific calculator template on the new website.The calculators will be powered by the engines stored within the centralisation CMS and connected via an API. |
| 6.8 U-marketing suite integration | Integration to U-marketing suiteBOI will be able to take advantage of all of the features within u-marketing suite. Enjoy will be responsible for the integration of the tool but not for the set-up of any of the features that BOI want to use.It is confirmed that they key features BOI would like to use the tool for are:Use content personalisation for certain users so they see specific content. This can be managed with the u-marketing suite tool as long as the areas for personalisation are content editable.Specific content being shown to the user if they navigate to the site via an email and specific URL given in the email –Eg. Content / navigation linksEnjoy will investigate this requirement on u marketing and supply the link format of how this would need to be supplied once investigated and if achievable. |
| 6.9 PDF download template | Various areas of the site allow the user to download a PDF of the information on the page – i.e. BDM contact.Enjoy will ensure the PDF template is updated with the new BOI4I logo and branded coloursIt is dependent on the user’s browser settings whether the print PDF button automatically downloads the PDF or whether it opens the users print window.Enjoy will set this to automatic download for the majority of browsers. |
| 6.10 Email template | Enjoy will create an email template which will include a header, footer and body text.The body text will be lorem ipsum for BOI to populate as required for their future emailsPlease note that some email clients do not support specific fonts. The webfont chosen is reflected in the signed of designs. |
| 6.11 Live chat | Enjoy will add the live chat GoMoxie live chat code transferred from the current live BOI site.This will be implemented through tag manager by adding the code through tag manager to the pages where the live chat should show.Live chat will show on:* BTL calculator page
* First start calculator page
* Affordability calculator page
* Criteria look up page
* Contact us page

No changes to the current live chat functionality will be made. |
| 6.12 Solicitor CSV upload | For the solicitor look up page the BOI team will be able to upload the content shown in the solicitor listing panel via a CSV upload.The content included in the upload is as follows:* Solicitor name
* Address
* Phone
 |
| 6.13 Auto complete search | Within the elastic search implementation for site search Enjoy will include auto complete when the user starts to type a search term.The auto complete will start after a user has typed 3 characters into the search bar. If there are suggestions based on the first three characters, then a dropdown of suggested search items will appear for the user to click.If there are no suggested base don the first 3 characters no dropdown will appear. |
| 6.14 CSV upload for products(pending CR sign off) | For the Products page the BOI team will be able to upload the content shown in the product listing panel via a CSV upload.The content included in the upload matches the information shown in the product table:* Term
* Rate
* Description
* The overall cost of comparison
* Product fee
* Features
* Early repayment charges (% of the sum repaid)
* Code

The upload would also include the information that then allows the user to use the product filters:* Product type
* Term (already covered above)
* Category
* LTV %
* Interest only (Y/N)
* New (Y/N)
 |
| 6.15 BDM CSV upload(pending CR sign off) | For the BDM finder page the BOI team will be able to upload the content shown in the BDM listing panel via a CSV upload.The content included in the upload will be as follows:* Name
* Job title
* Phone
* Email
* Biography
* Postcode areas covered
 |

# Sitewide Elements

## Persistent header

The website will have a persistent header, when the user is scrolling back up the page, and will have the following components:

|  |  |
| --- | --- |
| Title | Requirements |
| 7.1.1 Header logo | Logo will be present on the header.When the user scrolls the logo will reduce in size to a smaller version (as per design) reducing the depth of the header overall. When the user scrolls back to the very top of the page the full logo would enlarge and be seen again.Acceptance Criteria & Requirements1. Is the logo visible regardless of where I am on the site?
2. Does the logo take me to the homepage when clicked on?
 |
| 7.1.2 Register / log in button | Login / Register link text will be present on the header. This is a link to an external site only.Acceptance Criteria & Requirements1. When I click on the register / log in link I am taken to the third-party site:

Register: https://www2.mortgageapplicationservice.co.uk/web/index.html#/index/BOI/agentRegistrationLog in: https://www2.mortgageapplicationservice.co.uk/web/index.html#/index/BOI/login/?login=true |
|  | The CMS user will be able to change the link within the CMS if required. |
| 7.1.3 For intermediary use banner | On the header there will be a piece of banner text that states the website is “For intermediary use only”This text is content editable. |
| 7.1.4 Contact Us link | In the top header there will be a link to the contact us pageThis will be CMS editable so that the CMS user can update the link as required |
| 7.1.5 Search bar | There is a search bar within the persistent header.Users can enter search criteria within the search and click the search icon to trigger the search.They can also click on the dropdown of suggested search items if any have appeared.Results will be displayed on a separate page – search result template is in a later section of this spec. |
| 7.1.6 Navigation | The site user will be able to access the main navigation, regardless of where they are on the siteAcceptance Criteria & Requirements1. I can see the main navigation regardless of where I am on the site.
2. On each of the secondary nav items I can see a text link
3. If I click on a title of a key section, do I get taken to that page?
4. If I hover over a section, does a drop-down menu appear displaying related child pages?
5. If I click on a child page, do I get taken directly to that page?

**CMS user**As a CMS user, I want the ability to manage the main navigation so I can display key pages.Acceptance criteria 1. Can I populate the navigation from the tree structure?
2. Do I have the ability to add key pages, so they display in the navigation?
3. Do I have the ability to hide / remove key pages, so they no longer appear in the navigation?
4. Do I have the ability to overwrite the page name to change what displays in the navigation?
5. Can I change the order the key pages appear in the navigation?

BOI4I will be responsible for the link naming and to ensure that the navigation is balanced as per the design. The design will be based on the sitemap provided in the functional requirements gathering presentation |

## Footer

By default, there will be a footer on every page of the website. The footer will have the following components

|  |  |
| --- | --- |
| Title | Requirements |
| 7.2.1 Logo and for intermediary use only text | Logo will be present on the footer plus “For intermediary use only text” with exclamation mark.Acceptance Criteria & Requirements1. Does the logo take me to the homepage when clicked on?
 |
| 7.2.2 Copyright link | The copyright link will show in the footer. This will be content editable.Acceptance criteria & requirements:1. The copyright year will automatically update at midnight on 31st December each year to ensure the CMS user doesn’t have to manually update the year in the copyright
 |
| 7.2.3 Legal text / footer text | There will be a free type field to allow BOI4I to add the required legal text and information on branch opening hours into the footerAcceptance Criteria & Requirements1. As a CMS user I can edit the free text field in the footer in the CMS
 |
| 7.2.4 Bottom links | There will be a space for x 4 bottom links at the end of the footer for:* Privacy
* Legal Information
* Accessibility
* Contact

Acceptance Criteria & Requirements1. As a CMS user I can edit link for the bottom links in the CMS
 |
| 7.2.5 Quick links | There will be 4 columns of quick links in the footer. These are to allow users quick access to various pages on the site or to external sitesAcceptance Criteria & Requirements1. As a CMS user I can edit the headings for the quick link columns
2. As a CMS user I can edit the quick link names and links
 |

## Notification bar/pop up and warning bar

The website will have a notification bar / pop up which allows BOI4I to attract users to key site information. It will also have a scrolling warning bar for any site updates

|  |  |
| --- | --- |
| Title | Requirements |
| 7.3.1 Notification pop up | Exact position of the pop up to be decided in the design phase.The notification pop up will allow BOI4I to add key information for users when they land on the site. There is an info icon plus body text.The CMS user will be able to set the amount of time between when the pop up is closed by the front end user to when it re-shows on the site. This will be set in number of minutes. (pending CR sign off)CMS user Acceptance Criteria & Requirements1. I can add body text to the notification pop up and text links
2. I can set the amount of time between when a pop up is shown and when it re-opens for the front end user (pending CR sign off)

Site user Acceptance Criteria & Requirements1. I can click a text link in the pop up and be taken to the linked page
2. I can click to close the pop up
3. I am shown the pop up whenever I open the site on a new session
 |
| 7.3.2 Scrolling warning bar | There will be a scrolling warning bar on the homepage to allow BOI to add key messages to alert site users.**CMS user Acceptance criteria and requirements**1. I can add up to three different warning messages to automatically scroll
2. If only one warning message is populated in the CMS then the bar will not scroll
3. I can add text and text links to URLs into the bar

**Site user Acceptance criteria and requirements**1. I can see messages scrolling automatically if more than 1 has been entered in the CMS back end
 |

## Unsupported browser warning bar

A generic warning bar to users who are on older browsers to tell them the site may not properly function in their chosen browser

|  |  |
| --- | --- |
| Title | Requirements |
| 7.4.1 Unsupported browser warning | BOI4I have some users who visit the site on very old browsers. To encourage the users to upgrade browser and to warn them that the site may not function properly on their chosen browser there will be a pop-up warning.The pop-up warning will use JavaScript to detect if a browser is on the unsupported list. Supported browsers will be those listed in the browser support section of this specification and those above that.Any new unsupported browsers will need to be added to the list by Enjoy at an additional cost to this project.CMS user Acceptance Criteria & Requirements1. I can edit the text in the unsupported browser warning message
 |

# Pods

Pods are created within a central library in the CMS. They allow the CMS user to create pod content and then add this to various different pages across the site without having to create the same content multiple times. They allow the user to update the content in the central library and this will then update around the site wherever shown.

Generally, the pod size will shrink to the content entered within it. If the user does not add a button / sub text then the pod size will shrink to accommodate, it will not leave a space where that content would have been.

|  |  |
| --- | --- |
| Title | Requirements |
| 8.1 Awards Pod | BOI4I require a pod allowing them to upload award icons for awards they have recently won.CMS User acceptance criteria and requirements1. I can add a title to the pod in the CMS
2. I can add sub text to the pod in the CMS
3. I can upload award images to be shown within the pod
4. The award images will stack onto another row dependent on how many images are shown
5. A maximum of 12 award images can be uploaded to the pod
 |
| 8.2 Service levels / forms and guides / promo pod | There will be a 3-block panel which is intended to feature the following information per block. The CMS user can mix and match between which combination of 3 blocks are shown.**Current service levels:**1. Title
2. Sub text
3. X 3 service level titles with dates and icons
4. Link

**Forms and Guides**1. Title
2. X 5 document PDF links with name and icon
3. Link

**Promo pod:**1. Icon
2. Title
3. Sub text
4. Link

CMS user acceptance criteria and requirements:1. I can edit any of the elements listed above with the CMS
2. For the forms and guides block I can upload a pdf to the media library to link to the listed items
3. I can add links to any of the blocks which will apply to the title and the link text
4. The blocks are not interchangeable and will always appear in the same order, the content editable areas can have their content changed as per the CMS users’ requirements
5. The user must always populate all 3 blocks
6. The CMS user can select which combination they would like to show, i.e x 2 forms and guides and x1 promo, OR x 3 promo
 |
| 8.3 Contact pod | BOI4I require a pod allowing them to highlight contact information to usersThe pod will show contact via three methods:Phone / email / find your BDMCMS User acceptance criteria and requirements1. I can add a title to the pod in the CMS
2. I can add sub text to the pod in the CMS
3. I can add a pod link and link text
4. I can add the contact route text title
5. I can add a link to the contact routes – i.e. bdm finder / email / post
6. I can edit the icon shown

User acceptance criteria and requirements1. I can click on the button or the title or the contact route text to go to a corresponding linked page
 |
| 8.4 Promo pod | (This pod will replace the FAQ pod cited in the SOW)This pod will allow BOI4I to highlight key site information. There will be a title, supporting text and link buttonCMS User acceptance criteria and requirements1. I can edit the title, supporting text and link button

Site User acceptance criteria and requirements1. I can click the title or link button to go through to the linked page
 |
| 8.5 Form pod | With the installation of Umbraco forms the CMS user will be able to create forms within the CMS.To add these forms to a page the CMS will add a forms pod and select the form to show within the pod.Basic form fields will be styled as per the agreed design.* This includes:
* Short text area
* Large text area
* Dropdown list
* Checkbox
* Radio button
* Confirmation button

CMS User acceptance criteria and requirements1. I can add a form created within the CMS solution to a form pod/grid element
2. When a form is submitted the CMS user can select the confirmation message that will appear on submission
 |
| 8.6 BDM and TBDM pod | BOI can add a BDM and TBDM pod to a page, this contains the following items for each BDM/TBDM component:* Image
* Heading
* Body text

It is intended that BOI will use these pods for personalised content using U marketing suite capabilities.CMS user acceptance criteria:1. I can edit the heading, image and body text of the pod
 |
| 8.7 Promo pod with image(pending CR sign off) | BOI can add this pod to a page, this contains the following items to edit:* Image
* Heading
* Body text
* CTA and CTA link

CMS user acceptance criteria:1. I can edit the heading, image, CTA text , CTA link and body text of the pod

User acceptance criteria:1. When I click on the CTA or heading I will click through to the corresponding linked URL
 |

# Forms

All forms will be created using Umbraco forms and added to the page using a form pod/grid element.

# Common elements

Common elements can be added to any CMS page using a Grid element to add the item to the page

|  |  |
| --- | --- |
| Title | Requirements |
| 10.1 Standard content Rich text editor | As a CMS user, I would expect the following styles to be accessible within the content area:* Headings (H1, H2 etc) to the required level, once designs are confirmed single column and double column (Boi have the capacity to choose colour from blue, dark grey, white
* Paragraph single column
* Paragraph double column
* Bullet point list (as per signed off design)
* Numbered list
* Table
* Divider line
* FAQ accordion – ability to add a question and answer provided in the sub text within the accordion
* Child page components (with icon, title, sub text and link) – these will allow CMS user to link to other page son the site or external links

CMS User Acceptance Criteria & Requirements 1. I can add a content area to a page.
2. Do all the required styles render correctly when added to a page?

Site user acceptance criteria:1. Does the FAQ accordion open and close when the + / - are clicked
 |
| 10.2 Full width Image with caption | The CMS user can add an image from the umbraco media library with caption to a page as a common elementCMS User Acceptance Criteria & Requirements 1. I can add an image from the media library plus add a caption
 |
| 10.3 PDF upload icon and text | BOI4I need the ability to add PDF guides to pages and for these to stand out to users to download or print. In the first instance this will always open the print window for any pdfs. The user can then choose to save as pdf or print out.The CMS user can upload a pdf and an accompanying PDF icon will show along with the link textCMS User Acceptance Criteria & Requirements 1. I can add upload a pdf to the CMS to show on the front end
2. The order of the PDFs in the back end of umbraco will reflect the order the pdf’s show in the front-end solution
3. I can change the pdf link text shown on the front end (PDF name)
 |
| 10.4 Video embed | The standard content page will allow the CMS user to be able to embed onto the page videos uploaded into the CMS media library and add a caption/sub text and titleCMS User Acceptance Criteria & Requirements 1. I can add a video from the media library plus add a caption/sub text and title
 |
| 10.5 Podcast/sound file embed | The standard content page will allow the CMS user to be able to embed onto the page sound files uploaded into the CMS media library and add a caption.CMS User Acceptance Criteria & Requirements 1. I can add a sound file from the media library plus add a caption
 |
| 10.6 Image gallery | BOI can add an image gallery to the page which will display images from the media library with icons to click through to the next image. I can add a title and caption/subtextIf only one image is added the gallery buttons will not showCMS user acceptance criteria:1. I can add an image, title and caption/subtext

User Acceptance Criteria & Requirements 1. I can use the gallery buttons to click through to the next image
 |
| 10.7 Page header | As a CMS user, I can populate a header area of the page with the following content:* Page title
* Optional background image
* Supporting text

The CMS user can select the colour background of the colour block from the BOI blue or BOI teal. The text colour will change dependent on background colour chosen:* Blue background = white text
* Teal background = Dark grey text

**Quick links and BDM / View products CTA**The header will also include a quick links panel and find your BDM CTA and view products CTA.The CMS user can turn these on and off as required per page if they do not want the links to show on certain pages.There is space for up to 4 quick links. If less then 4 links added the box will reduce in size.The quick links and find your BDM CTA and view products CTA will be populated at a global level but can be over-written at page level.This means that the CMS user can add links that are specific to that page if the global links are not relevant.If the links are left empty at page level, then they will pull through the links added at the global level unless the CMS user has chosen to not show the “view products” and “bdm finder link”CMS User Acceptance Criteria & Requirements 1. I can add an image from the media library as the header background and edit the title and supporting text?
2. If I don’t add a background image, does the header area default to a set fallback colour?
3. If I don’t add quick links, bdm finder link, products link at page level they will pull through the links from a global level
4. If I add the quick links, bdm finder link, products link at a page level they will override the global links set
5. I can choose to not show the BDM finder or view products links in the header
6. I can choose the colour block background colour from teal or blue
 |

# Templates

## Homepage

The homepage will allow CMS users to add any of the common elements or pods. The homepage will contain the following specific items:

|  |  |
| --- | --- |
| Title | Requirements |
| 11.1.1 Homepage header | This header is the same as the page headers throughout as detailed on section 10.7They consist of:* Page title
* Optional background image
* Supporting text
* CTA link and link text
* Quick links box – x 4 links
* BDM finder CTA
* View products CTA

The CMS user will be able to select the background colour of the colour block area as either the BOI Blue or BOI Teal. The text colour will change accordingly:Blue background = white textTeal Background = Dark grey textCMS User acceptance criteria and requirements1. I can edit the background image, title, supporting text, CTA link and CTA button text in the CMS
2. I can set the global level links and text for the quick links/bdm finder CTA/view products CTA
3. I can choose the block colour background colour from teal or blue

Site User acceptance criteria and requirements1. If I click on any linked item, I am taken to the linked page
 |
| 11.1.2 Homepage carousel quick links. BDM finder and products link | Over the header a Quick links panel, BDM finder CTA panel and products CTA link panel will show.These links / text can be set at a global level and then pull through to other page headers through the site, unless the CMS user manually updates the links for this section on those specific pages.CMS User acceptance criteria and requirements1. I can edit the quick links title
2. I can edit each of the quick links text and connecting link
3. I can upload an image icon for each of the quick links
4. I can add a maximum of 4 quick links
5. I can edit the BDM finder panel link text and link
6. I can edit the products CTA panel link text and link

Site User acceptance criteria and requirements1. If I click on a quick link, I am taken to the corresponding linked page
2. If I click on the BDM finder CTA/products CTA I am taken to the corresponding linked pages
3. If less than 4 quick links the box size changes to fit the links shown
 |
| 11.1.4 Common elements and pods | The CMS user will be able to add any of the common elements or pods to the page |

## Product page

|  |  |
| --- | --- |
| Title | Requirements |
| 11.2.1 Product page text area | At the top of the page BOI will be able to enter the following:* Title
* Body text
* Help to Buy x 2 logos

This will all be content editable |
| 11.2.2 Product filters and tagging | The filter block will have a content editable title and sub text area.The user will be able to filter products using the product filter which will contain the following categories:* Products – filter dropdown
* Terms – filter dropdown
* Categories – filter dropdown
* LTVs – filter dropdown
* Interest only – checkbox
* New products – checkbox
* Update button
* Clear button

The CMS user will be able to create the values for the Drop downs in a central library and will apply to the product via a tag.The filters will be powered by the content tags applied based on the filter categoriesWhen a user has filtered products this will create a unique URL query string. This will then allow BOI to copy that unique URL and add this an internal link on another website page. This will then allow customers to be able to land on the products page in a prefiltered state.CMS User acceptance criteria and requirements:1. I can add a filter value based on Product / term / category / LTV and apply this to a product present in the CMS
2. I can tick a box in the CMS to say whether the product is a “new product” or “interest only”
3. If I remove the tag from the product the product will no longer show under that filter item

Site User acceptance criteria and requirements:1. Once I have chosen my selected filter values and pressed update the products shown are related to the filter values set
2. If I click clear filter the filters will reset
3. When I filter and click search the URL is updated to a unique URL
 |
| 11.2.3 Product listing table | Products will be listed within a table showing the following information:Above table:* LTV rate
* Product name

Within table:* New
* Term
* Rate
* Description
* The overall cost comparison
* Product fee
* Features
* Early Repayment charges (% of the sum repaid)
* Code
* Product to be Withdrawn yes/no – (info in section 11.3) **– this will not be visible on the front end only in the CMS**
* Product withdrawal date - (info in section 11.3) **– this will not be visible on the front end only in the CMS**

The order of how the products are displayed will remain the same as the logic applied to the BOI4I site at the time of web build.**PDF print:**For each grouping of products within a table the user will be able to print the information to a branded PDFCMS User acceptance criteria and requirements:1. The products shown are loaded into the CMS via a CSV upload (as per technical requirements section)

Site User acceptance criteria and requirements:1. I can see products listed as per the filter criteria
2. I can click to print products into a PDF
 |
| 11.2.4 Common elements and pods | The CMS user will be able to add any of the common elements or pods to the page |

## Withdrawing products

|  |  |
| --- | --- |
| Title | Requirements |
| 11.3.1 Withdrawing products listing | BOI4I need to be able to list which products are going to be withdrawn from use.The products visible in the CMS should have a checkbox and date field to mark whether the product is going to be withdrawn and/or the date of withdrawal:* Product to be Withdrawn checkbox – Yes / No
* Date of product withdrawal – Date field (if no date entered then today’s date will be used)

Products that have been selected with the checkboxes show in a list on the withdrawn products page, with the product details as per the product listing page in section 11.2Withdrawing products will be a list only without the ability to filter. The withdrawn products will only show on the withdrawn products page when the date for their withdrawal (as entered in the CMS) is reachedThe user will be able to download the listed products into a PDF format.User acceptance criteria:1. I can download the list into a PDF
2. I only see products that have been marked as withdrawing in the back end of the CMS
 |
| 11.3.2 Countdown timer for withdrawing products(pending CR sign off) | A countdown timer can be set to show on withdrawing products. This will display to the user on the front end the amount of time before a product is withdrawn from the site.CMS user acceptance criteria:1. I can set the expiry date for a product so the countdown timer shows for that product
 |
| 11.3.3 Common elements and pods | The CMS user will be able to add any of the common elements or pods to the page |

## BDM Finder

|  |  |
| --- | --- |
| Title | Requirements |
| 11.4.1 BDM finder page intro text | The CMS user will be able to add title and body text above the BDM search toolThis text is content editable. |
| 11.4.2 BDM look up | Site users will be able to search for their nearest BDM using the postcode look up tool.The postcode tool will work on the same logic criteria as the current BOI4I site at the time of build.The user will be able to add a postcode with or without a space e.g.: LS16 9PP or LS169PPThe CMS user will be able to add content to support how the tool works.CMS user acceptance criteria and requirements:1. I can enter a title and subtext to support the BDM finder tool
2. I can add an icon to the look up tool

Site user acceptance criteria and requirements:1. When I enter my postcode and press search, I will see the associated BDM contact to my postcode area
 |
| 11.4.3 BDM listing | The number of search results found will display above the results.The BDM details will be shown in list with the following information per contact, these will show in side by side blocks on larger screens* Name
* Job title
* Image
* Phone
* Email
* Profile information
* Postcode areas covered (this will be in the back end CMS only and not on the front end)

If the profile information is long a “read more” link will show. On click this will expand the box for the user to read on.The user will be able to print the BDMs listed into a PDFCMS user acceptance criteria and requirements:1. I can add/edit the information for each BDM contact in the CMS

Site user acceptance criteria and requirements:1. I only see BDM contacts who are within my postcode area as set by the CMS tagging after my search
2. I can download a PDF of my BDM contact results
 |
| 11.4.4 Common elements and pods | The CMS user will be able to add any of the common elements or pods to the page |

## Solicitor search

|  |  |
| --- | --- |
| Title | Requirements |
| 11.5.1 Solicitor look up tool | Site users will be able to search for solicitors on the BOI4I’s panel using the postcode / name look up tool.The postcode / name look-up tool will work on the same logic criteria as the current BOI4I site at the time of build.The user will be able to add a postcode with or without a space e.g.: LS16 9PP or LS169PPThe CMS user will be able to add content to support how the tool works.CMS user acceptance criteria and requirements:1. I can enter a title and subtext to support the solicitor look up tool
2. I can tag the solicitors entered into the CMS in order to power the look up tool

Site user acceptance criteria and requirements:1. When I enter my postcode and press search, I will see the associated solicitor contact(s) to my postcode area
2. When I enter the solicitor name and press search, I will see the associated solicitor contact(s) linked to the name entered
 |
| 11.5.2 Solicitor listing | The number of search results found will display above the results.The CMS user will have access to a content area to give information about the panel and add text about how this works.The solicitor details will be shown in list with the following information per contact:* Name
* Distance from postcode provided
* Address
* Phone

Initially the results will show in a closed accordion. The user can click to open or close a solicitor detail.CMS user acceptance criteria and requirements:1. I can upload the solicitors via a CSV upload tool

Site user acceptance criteria and requirements:1. I only see solicitor contacts who are within my postcode area as set by the CMS tagging
2. I can only see solicitor contacts who have the name entered in the look up tool
 |
| 11.5.3 Pagination | Pagination will be shown on the page when the number of results exceeds 10.User acceptance criteria:1. The page number I am on is highlighted (as per design) within the pagination tool
2. I can see the end page of results
3. I can see the page number above the page I am on
4. I can click the double chevron to go to the very first or very last page
5. I can click the single chevrons to move to the next or previous page
 |
| 11.5.4 Common elements and pods | The CMS user will be able to add any of the common elements or pods to the page |

## Standard content template

|  |  |
| --- | --- |
| Title | Requirements |
| 11.6.1 standard content page | The standard content page will allow the CMS user to add any element from within the common elements or pods from this functional specification |

## Campaign landing page

|  |  |
| --- | --- |
| Title | Requirements |
| 11.7.1 Page layout / supporting material panel  | The campaign landing page will allow for the same standard content / common elements / pods as per the other pages, but this will be not be full width as per the rest of the site.Instead this will leave space on the right-hand side for a supporting materials side panel.**Supporting materials panel**On the right-hand side of the main body of the page there will be a supporting materials panel.The supporting materials title is content editable.This will allow BOI to add the following items as required:* video embed, with title
* File download block – allows linked document plus title
* CTA link button – linked URL and title

There will be no restriction on the number of supporting materials the CMS user can add. CMS user acceptance criteria:1. I can add a video from the umbraco media library and a video title
2. I can add a file to be downloaded from the umbraco media library and a file name for the front end
3. I can add a link to an internal or external URL and a link name
4. I can add multiple of any of the above in any order

  |
| 11.7.2 How it works component | BOI will be able to add a “how it works” block, this consists of:Individual content areas 1,2,3 – within these content areas the CMS user can use:* tick boxes bullet list
* Add a title
* Paragraph text

CMS user acceptance criteria:1. I can edit the title and body text of each block 1,2, or 3
 |
| 11.7.3 Common elements and pods | The CMS user will be able to add any of the common elements or pods to the page.  |

## Service Update template

|  |  |
| --- | --- |
| Title | Requirements |
| 11.8.1 Service level update intro text | The CMS user can add a page title and body text to give insight to the what the page contains. |
| 11.8.2 Service update panel | BOI4I require a page to highlight key service updates and timescales.Each service update area will allow the CMS user to add:* Image
* Title
* Subtext
* Time/date field – free text field to allow BOI4I freedom to add date, minutes, text as required
* Body text

The CMS user can add as many service update panels as required this is not limited to a set numberCMS user acceptance criteria and requirements1. I can edit any/add information for any of the fields within the service update block
 |
| 11.8.3 Common elements and pods | The CMS user will be able to add any of the common elements or pods to the pageThese will be sized accordingly to fit the 2 column layout of this page |

## Contact page

This page template is to be used for the contact page

|  |  |
| --- | --- |
| Title | Requirements |
| 11.10.1 contact panels | The CMS user will be able to add the details of the method of contact:* Phone
* Email
* Existing customer queries

Under each method of contact the CMS user will be able to add body text, bullet points, in text links as required.A sub text area relating to call times and charges is available under the main body content.CMS user acceptance criteria1. I can add content as required into each of the contact areas, including bullet points, body text and in text links
2. I can add the subtext relating to call times and charges
 |
| 11.10.2 Common elements and pods | The CMS user will be able to add any of the common elements or pods to the page |

## Criteria look up template

This page template is to be used for the calculator and toolkit listing pages. It will give the site user and overview and then links to click through to specific pages

|  |  |
| --- | --- |
| Title | Requirements |
| 11.11.1 Intro text area | There will be an area for the CMS user to add some intro text and a title to the top of the page (as per the standard content block)Plus adding any of the common elements including the pdf download blocks |
| 11.11.2 Criteria look up tabs | The CMS user will be able to add some sub text to tell the site user how to use the page and filters.This page will have 2 tabs to allow the user to filter between to different categories. The tabs are:* Buy to let
* Residential

The tab selected by the user will be highlighted as per the agreed design.When on each tab the user will only be able to filter content related to that tab.When a user has clicked on either tab this will create a unique URL query string. This will then allow BOI to copy that unique URL and add this an internal link on another website page. This will then allow customers to be able to land on the criteria look up page prefiltered to the desired tab. |
| 11.11.3 Criteria look up filter | The user will be able to first filter the criteria by using the following fields:* Category dropdown field
* Search term – search free type field

The user can click a search button to search, or a clear button to clear the data entered into the fields.Based on the search criteria and filter dropdown entered the A-Z criteria will update with the content related.User acceptance criteria:1. I can choose a category from the dropdown and click search and results are updated accordingly
2. I can type a search term and the results are updated accordingly
3. I can choose a dropdown category and write a search term and the results are updated accordingly
4. When the results are shown I can see the number of results
5. When I click clear my search criteria is cleared
6. If my search has no results, I see a message to tell me so
 |
| 11.11.3 Criteria look up A-Z filter | The user will be able to filter the criteria information on each tab using an A-Z filter.The user can use the A-Z filter without having pre-filtered using the top filterThe A-Z will be based on the first letter of the first word of the criteria. E.g. D = Debt to income User acceptance criteria:1. If there are no criteria items for a certain letter the letter will be greyed out in the A-Z filter
2. When the user clicks on a letter of the alphabet, they will be shown the corresponding criteria results.
3. The letter I am on is highlighted in some way (as per design)
 |
| 11.11.4 Criteria listing item | The CMS user will be able to add the criteria listing items with the following information:* Title
* Country – England, Wales & Northern Ireland or Scotland
* Criteria details (free text)
* **Buy to Let** or **Residential** (in order to power the use of the tabs)

Site user acceptance criteria & requirements:1. I will be able to download a PDF of the individual criteria information I am interested in
 |
| 11.11.5 Common elements and pods | The CMS user will be able to add any of the common elements or pods to the page |

# Calculators

## Overdraft and Loans calculators

|  |  |
| --- | --- |
| Title | Requirements |
| 12.1 overdraft calculator & loans calculator | The overdraft and loans calculators will not be re-designed or rebuilt for the new website.Code will be taken from existing BOI4I site and put into the new solution.Calculator URLs:Loans: <https://www.bankofireland4intermediaries.co.uk/uk-loans-calculator/>Overdraft: [https://www.bankofireland4intermediaries.co.uk/overdraft-calculator](https://www.bankofireland4intermediaries.co.uk/overdraft-calculator/) |

# Ad-hoc

## Error page

The error message will be displayed is there is an internal 500 error, or a 404 error. It will be generated automatically by the website when required.

|  |  |
| --- | --- |
| Title | Requirements |
| 13.1 error page | A standard content area will be available for the CMS user to update the error message shown |

## HTML sitemap

|  |  |
| --- | --- |
| Title | Requirements |
| 13.2 sitemap | An HTML sitemap will be created based on the pages created within the site |

## Search results and no search results

|  |  |
| --- | --- |
| Title | Requirements |
| 13.3.1 search results | As a website user, I want to be presented with a list of relevant results relating to my search query, ordered by relevancy. Relevancy will be based on what’s classes as important fields, such as Title or Tags. Each search result will show:* Page title
* Page description
* Link to view the page

There will be pagination if there are more than 10 results Site user Acceptance Criteria & Requirements 1. Are search results listed in relevancy order? (i.e. page title, body content)
2. I can access the page I require from the search results.
3. I can use pagination to view other pages of results if there are any
 |
| 13.3.2 No search results | As a website user, if the website returns no matching results for my search query, I want to be shown the following:* A friendly message notifying me there are no matching results
* The ability to perform another search

Acceptance Criteria & Requirements & Requirements1. Am I shown a useful message when my search has no matching results?

**CMS user**As a CMS user I need to be able to edit the message shown when someone does not get a search result.  |
| 13.3.3 Common elements and pods | The CMS user will be able to add any of the common elements or pods to the page |

|  |  |
| --- | --- |
|  |  |
|  |  |
|  |  |

# Client Approval

I agree to Enjoy Digital Communications Ltd Standard Terms of trade and authorise the project to go ahead.

**Authorised Signatory**
Duly authorised for and on behalf of ENJOY DIGITAL COMMUNICATIONS LIMITED

Signed:

Date:

**Authorised Signatory
Duly authorised for and on behalf of Bank of Ireland for Intermediaries**

**Signed:**

**Date:**

**Client Purchase Order Number
If a purchase order number is not required, please write the name of the person responsible for authorising purchases.**